



Staff Summary Report

Council Meeting Date: 1-10-08

Agenda Item Number: _____

SUBJECT: Request to award a one-year contract with two, one-year renewal options to Somerset Landscape & Maintenance, Inc. for palm tree trimming.

DOCUMENT NAME: 20080110fslg16 **PURCHASES (1004-01)**

SUPPORTING DOCS: No

COMMENTS: (IFB #08-023) Total cost for this contract shall not exceed \$60,000 during the initial contract period.

PREPARED BY: Lisa Goodman, CPPB, Procurement Officer, 480-350-8533

REVIEWED BY: Michael Greene, CPM, Central Services Administrator, 480-350-8516

**LEGAL REVIEW AS
TO CONTRACT FORM**

ONLY: N/A

FISCAL NOTE: Sufficient funds have been appropriated in 2553, 2555, 2556, 2559, 6302799, and 6399839 - 6672.

RECOMMENDATION: Award the contract.

ADDITIONAL INFO: Invitation for Bid (IFB) #08-023 was sent to forty-nine vendors and only one vendor responded. An evaluation committee comprised of Parks and Recreation and Procurement staff reviewed the response. The committee's recommendation is to award the contract to Somerset Landscape & Maintenance, the lowest, responsive, responsible bidder.

Vendor's Bid Offer

It is REQUIRED that Bidder COMPLETE, SIGN and SUBMIT the original of this form to the City Procurement Office with the bid response offer. An unsigned "Vendor's Bid Offer", late bid response and/or a materially incomplete response will be considered non-responsive and rejected.

Bidder is to type or legibly write in ink all information required below.

Bidder's Company Name	<u>Somerset Landscape & Maintenance, Inc.</u>		
Company Mailing Address	<u>19051 S. Arizona Ave. Chandler AZ 85286</u>		
Company Street Address	<u>19051 S. Arizona Ave. Chandler, AZ 85286</u>		
Bid Offeror Contact	<u>Brian Lemmermann</u>	Title	<u>President</u>
Contact's Phone No.	<u>480-782-5296</u>	E-mail Address	<u>somersetlandscape@cox.net</u>
Bidder's Company Tax Information:			
Arizona Transaction Privilege (Sales) Tax No.	<u>07-662548-G</u> or		
Arizona Use Tax No.	<u>07 615055</u>		
Federal I.D. No.	<u>86-1042562</u>		
City & State Where Sales Tax is Paid	_____		

THIS BID IS OFFERED BY

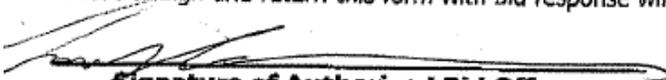
Authorized Bid Offeror (Type or Print in ink) Brian Lemmermann

Bid Offeror's Title (Type of Print in ink) President

Date 11/7/07

REQUIRED SIGNATURE OF AUTHORIZED BID OFFEROR (Must Sign in Ink)

By signing this Bid Offer, Bidder acknowledges acceptance of all terms and conditions contained herein and that prices offered were independently developed without consultation with any other bidder or potential bidder. Failure to sign and return this form with bid response will result in a non-responsive bid response.


Signature of Authorized Bid Offeror

11/7/07
Date

Proposal Questionnaire

The answers to the following questions will be used for evaluation purposes. When answering clearly, identify the number and question you are answering.

Has your firm been in business for at least five (5) years?

1. Provide a synopsis of the Proposal offeror's municipal expertise. (Note: The synopsis shall indicate if expertise is in-house locally or in another corporate office.)
2. Does one of the Proposal offeror's supervisors have a minimum of three (3) years experience (prior experience with other firm(s) is acceptable) in providing palm maintenance services similar in nature and scope? If yes, explain.
3. Has your company ever defaulted on a similar type of contract? If yes, please explain.
4. Provide by name, case and court jurisdiction any pending litigation in which the Proposal offeror was involved or judgments against Proposal offeror in the past five (5) years. Provide a statement describing the size and scope of any pending or threatened claims or litigation.
5. Provide the City with proof of financial stability. Proof of financial stability may include audited or reviewed financial statements, tax returns or other documents providing evidence of stability. The City shall be the sole judge of financial stability.
6. Will you comply with and be responsible for all safety requirements and procedures to prevent accidents and/or injuries?

_____ Yes _____ No
8. For safety purposes, professional equipment must be used to work above ground in the palm maintenance operations and such equipment must be designed to prevent falling, must comply with the City of Tempe, State, Federal and OSHA safety requirements and be acceptable to the City. List the equipment to be used to perform the palm maintenance task (boom lifts, etc.).
9. Will proper safety traffic control requirements be used to protect employees and the public and meet City, State and Federal OSHA requirements?

_____ Yes _____ No
10. Will palm maintenance meet ANSI Z133 and A300 standards, in addition to standards identified in this Invitation for Bid?

_____ Yes _____ No
11. Identify your proposed site supervisor(s) responsible for the quality of work conducted under this contract and their certifications and experience in palm maintenance.

12. Contractor is responsible for all work site cleanup and disposal of cut frawns, seed pods any other debris caused by the Contractor. Clean up is to be performed after each scheduled palm maintenance visit and more often if needed to maintain the safety of employees and the public.

Will you perform this responsibility? _____ Yes _____ No

13. Provide three (3) customer references for the type of work performed by your company. Identify local reference contact's name and phone number (government or large corporate references should be used if available).

14. Present a quality control plan to be used by the Proposal offeror to ensure the required services are provided as specified. The plan shall include an identified monitoring system covering all the services listed and methods for identifying and preventing deficiencies in the quality of services. Specifically the following factors must be included in the plan:

- 1 • Activities to be monitored to ensure compliance with all contract requirements
- 2 • Monitoring methods to be used
- 3 • Frequency of monitoring
- 4 • Samples of forms to be used in monitoring
- 5 • Title/level and qualifications of personnel performing monitoring functions
- 6 • File of all monitoring results, including any corrective action taken

15. Provide Arborist's name(s) and certification number(s) and copy of certification with expiration date.

Certification is required for bid to be considered responsive.

16. List all certified tree workers and certification numbers on staff that will be assigned to this contract. Provide a copy of the tree worker's certificates with your response.

Certification is required for bid to be considered responsive.

17. Provide Pest Control Qualifying Party and Applicator name(s) and license number(s). Provide a copy of Pest Control licenses with your response.

Proposal Questionnaire

1. Somerset Landscape & Maintenance, Inc (SLM) is a minority owned small business employing between 70 and 80 landscape professionals, operated by Brian S. Lemmermann. Brian has years of experience in all phases of landscape construction and maintenance. Somerset was originally established to provide top quality and affordable landscape maintenance to private individuals. As the Corporation grew through acquisitions and referrals, Somerset diversified its clientele, while still maintaining its commitment to top quality landscape maintenance service at affordable prices.

Somerset has current tree trimming, thinning, removal, and stump removal contracts with the City of Phoenix, Scottsdale, & Town of Gilbert. Somerset has two bucket trucks & several dump trucks and trailers available for use on this contract. The F-750 2004 Bucket truck has a 75 ft. reach and is one of the greatest reach, if not the greatest reach of any such truck in the Valley, servicing municipal accounts.

2. Jesse Gale is the Supervisor for one of our tree trimming crews. He has much practical experience in ROW service. He is currently working on the City of Phoenix ROW / Encanto Golf Course tree trimming contract. Along with dump trucks Jesse oversees the use of our 75 ft elevator truck with dump.

3. NO

4. NONE

5. Somerset is financially stable company which insures its ability to receive Bonding. Current annual revenue approximates \$3,000,000.00 per year; tree works in existing contracts are approximate \$300,000.00 per year. We service 300 + residential customers, numerous HOA's & different Cities and Municipalities. Positive cash flow after expenses depreciation value.

6. We have attached a safety plan outline and safety handbook & accident prevention manual made for our crews and Supervisors. All requirements & procedures, scope of work and schedules will be translated and bound for each crew to keep and study.

8 & 9. Somerset Landscape & Maintenance will be using vehicles and equipment that was recently used on the City of Chandler Right of Ways contract. The equipment was built for optimum visibility and safety. All vehicles used on this contract have rotating amber lights that are equal to code three, and directional light equipment to direct vehicle traffic away from the work crews. A full time mechanic is available to ensure the condition and safety of equipment. We have a large array of equipment if more is needed. Personnel safety gear such as: Safety hats, earplugs, gloves, high visibility vest, safety goggles, & dust masks.

Trucks

2000 Chevy 1500	Truck with directional and rotating safety lights
2005 Chevy 2500	Truck with directional and rotating safety lights
2003 Isuzu 4500	Dump Truck with directional and rotating safety lights
2005 MPR Isuzu	Dump Truck with directional and rotating safety lights
2004 F-750	Bucket Truck with 75 ft. lift.
2007 Salsco	Chipper

Other

1999 Chevy S-10	Truck with directional and rotating safety lights
1996 F-250	Bucket Truck with 40 ft lift
2001 F-250	Truck with directional and rotating safety lights

Somerset maintains a wide array of back up equipment at all times to preclude equipment problems. Additionally, Somerset has a fulltime mechanic available at the Corporation's base at 19051 S. Arizona Ave. (Loop 202 and Arizona Avenue), in Chandler Arizona. The corporation's office, repair facility and waste transfer operation are located at that facility.

10. YES

11. Jesse Gale will be on site Supervisor for each of the crews. He will make sure all tasks are completed in a timely manner. All debris removal on daily basis, clean properly. Jesse has practical experience in ROW service. He is currently working on the City of Phoenix contract. He oversees the use of our 75 ft elevator truck with dump.

12. YES

13. References attached

14. Quality Control Plan

- 1) Each activity specified in the contract will be monitored to ensure compliance
- 2) Completed daily work sheets submitted by crew leader will be compared with scheduled work requirements to ensure schedules are maintained. Weekly spot check of completed work will be done & documented to ensure quality standards are met or exceeded. Should sub-standard service be identified, additional training will be provided & additional monitoring initiated.
- 3) Weekly as services are performed.
- 4) Sample Gilbert forms attached.
- 5) Brian Lemmermann-President (arborist, president & 9 years experience)
Daniel Perez-Supervisor (supervisor, crew leader & 7 years experience)
- 6) Separate file for all monitoring will be maintained for monitoring records.

15. Brian Lemmermann-Arborist
Certification number WE-7918A

16. Current arborist will do all trimming; our palm tree trimmers assign to the City of Phoenix contract will finish their certified class at the start of contract.

17. See attached for qualifying party and applicator name & license numbers.

SAFETY PLAN OUTLINE

Contract Name/Location/Number:

Palm Tree Trimming City of Tempe #08-023

1. Contractor Safety Officer Assigned to Project:

Name: Jesse Gale

Address: 19051 S. Arizona Ave., Chandler AZ 85286

Phone: 480-782-5296

2. Contractor Corporate Safety Director:

Name: Brian Lemmermann

Address: 19051 S. Arizona Ave., Chandler AZ 85286

Phone: 480-782-5296

3. Contractor Corporate Safety Philosophy Pertaining to Project:

Safety through education is our goal

4. Contractor Accident Prevention Program:

Daily assessment of all equipment & vehicles is done by both mechanic and crew leaders. Repairs are made each evening. If something cannot be repaired in a timely fashion it is replaced until it is repaired.

5. Contractor Safety Training and Education Program:

All new employees undergo an equipment familiarization and safety class. Regular classes are held as refreshers and concerns are addressed at that time.

6. Contractor Medical/First Aid Services Program:

Employees are instructed to dial 911 for any emergency. Our office and safety officer are then to be notified. All trucks carry First Aid kits and the office has Severe Emergency Kit accessible to everyone. Phone #'s 911 for emergencies & Office #480-782-5296. The Emergency Action Plan is located inside the office, for reference at time of emergency.

7. Contractor Fire Prevention/Protection Program:

All vehicles carry fire extinguishers. Gasoline and other volatiles are kept in safety cans which are stored in locking containers on trailers.

8. Contractor Personal Protection Equipment Program:

All employees are supplied with long sleeve shirts, safety glasses, gloves, and hearing protection. These along with work pants and work boots are required equipment while working.

9. Contractor Personal Health/ Hygiene Program:

All water coolers are washed daily and any concerns are reported to the safety officer.

10. Contractor Accident Reporting of Recordables/Fatalities:

All accidents are reported to office and safety officers. The contract administrator is then notified with the status of any accident and individual. City of Tempe will be advised immediately.

11. Contractor OSHA Inspections Record:

Any OSHA inspections will be forwarded to City of Tempe upon completion.

SAFETY HANDBOOK & ACCIDENT PREVENTION MANUAL

1. Clothing – Long sleeve shirt, work pants, and work boots
2. Safety Equipment – Gloves, sunscreen, eye & ear protection.
3. All equipment or vehicle concerns need to be reported directly to mechanic and safety officer.
4. All new employees will pass equipment familiarization and safety class with safety officer and supervisor.
5. Equipment that is unsafe or in need of repair will be reported immediately and a replacement will be taken.
6. Hazardous materials are to be handled by trained or licensed employees, spills should be reported to supervisor and absorption materials used for clean-up. Waste will be disposed of through hazardous waste pick-up.

REFERENCES

<u>Job Name</u>	<u>Contact</u>	<u>Telephone</u>
City Of Scottsdale *Parks maintenance mowing, and litter removal services.	Bill Sturgill	602-689-1079 (1 year)
Town of Gilbert *Parks and Civic center maintenance.	Tim Hefner	480-503-6262 (3 years)
City of Mesa *Aquatics Sites landscape maintenance.	Brandon Erno	602-619-4878 (7 years)
City of Phoenix *Service Centers landscape maintenance.	Carmen Castillo	602-374-0658 (1 year)
City of Phoenix *Housing Sites landscape maintenance.	Pene Norville	602-534-5691 (1 year)
City of Phoenix *Forestry	Cougn Eihn	602-495-3765 (1 year)

PARKS DIVISION
LANDSCAPE MAINTENANCE QUALITY CONTROL



Date: _____
Week: _____
Time: _____

Inspector: _____

Areas	Debris & Trash Removal	Granite Raking & Leveling	Tot-Lot	Sand	Sidewalk & Curb	Structures & Ramadas	Appearance	Mow & Clippings	Rework Repsonse	Note
Circle G Park										
John Allen Park										
Civic Center Campus										
Nichols Park Basin										
Oak Tree Park										
Old West Basin										
Page Park										
Poco Verde Park										
Sunview Park										
Vaughn Basin										
Villa Madiera Park										
Village II Park										
Vista Allegre Park										
Comment:										

Approvals: _____

_____ Park Operations Supervisor

_____ Field Supervisor

- Rework Repsonse Priority**
- Needs immediate attention (24 hrs)
 - Complete within 48 hrs.
 - Complete within 72 hrs.

Janet Napolitano
Governor

STATE OF ARIZONA
Structural Pest Control Commission
9535 E Doubletree Ranch Road Scottsdale, AZ 85258-5514
(602) 255-3664 (602) 255-1281 fax
www.sb.state.az.us

Lisa Gervase
Executive Director

GREEN KEEPER CHEMICAL LANDSCAPE MGT

Business License number: 2403

Has been duly licensed since 07/20/1989 and is hereby authorized to engage in the business of Structural Pest Control within the State of Arizona for the year of 2007.

Qualifying Party Name(s)
JOHN EVAN BERGSTRÖM

Qualifying Party License Number(s)
1154

Does hereby qualify the business to practice in the following license category(s) of Structural Pest Control within the State of Arizona.

Licensed Category(s)
B3 - Right of Way Weeds
B5 - Foliage & Ornamentals

Qualifying Party License Number(s)
1154
1154



This license must be renewed by December 1 of each year, and shall expire on December 31 of each year. For any inquiries regarding this license please visit the Structural Pest Control Commission website at www.sb.state.az.us or contact the Structural Pest Control Commission.

Printed: 12/18/2006
By: HELEN

Company Name: Somerset

PRICE SHEET

ITEM NO.	DESCRIPTION OF REQUIRED MATERIAL, SERVICE OR CONSTRUCTION	QTY	UNIT	UNIT PRICE
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Price WITH Disposal Fee

1.	Palm Maintenance (trimming; skinning/shaving; seed pod and volunteer removal; clean up; waste disposal; inspection and recommendations) Exception: _____	1	Each	\$ <u>33.70</u>
2.	Palm Trimming (includes seed pod) and Skinning/Shaving ONLY Exception: _____	1	Each	\$ <u>32.70</u>
3.	Palm Trimming (includes seed pod) ONLY Exception: _____	1	Each	\$ <u>31</u>
4.	Palm Skinning/Shaving ONLY Exception: _____	1	Foot	\$ <u>5⁰⁰</u>
5.	Volunteer Removal ONLY Exception: _____	1	Each	\$ <u>3⁰⁰</u>
6.	Palm Tree Removal			
	a. Open Location			
	Species: <u>Mexican</u> to <u>CA.</u> & Height: <u>1'</u> to <u>20'</u> <i>FAN + DATE</i>	1	Each	\$ <u>300</u>
	Species: <u>↓</u> to <u>↓</u> & Height: <u>21'</u> to <u>40'</u>	1	Each	\$ <u>600</u>
	Species: <u>↓</u> to <u>↓</u> & Height: <u>41'</u> to <u>70'</u>	1	Each	\$ <u>1050</u>
	b. Restricted Location			
	Species: <u>Mexican</u> to <u>CA.</u> & Height: <u>1'</u> to <u>20'</u> <i>FAN + DATE</i>	1	Each	\$ <u>360</u>
	Species: <u>↓</u> to <u>↓</u> & Height: <u>21'</u> to <u>40'</u>	1	Each	\$ <u>720</u>
	Species: <u>↓</u> to <u>↓</u> & Height: <u>41'</u> to <u>70'</u>	1	Each	\$ <u>1,260</u>

Company Name: Somerset

PRICE SHEET

ITEM NO.	DESCRIPTION OF REQUIRED MATERIAL, SERVICE OR CONSTRUCTION	QTY	UNIT	UNIT PRICE
7.	Palm Stump Removal			
a.	Open Location			
	Diameter: <u>1" to 12"</u>	1	Each	\$ <u>35</u>
	Diameter: <u>13" to 24"</u>	1	Each	\$ <u>45</u>
	Diameter: <u>25 to 4p</u>	1	Each	\$ <u>55</u>
b.	Restricted Location			
	Diameter: <u>1" to 12"</u>	1	Each	\$ <u>55</u>
	Diameter: <u>13" to 24"</u>	1	Each	\$ <u>75</u>
	Diameter: <u>24 to 4p</u>	1	Each	\$ <u>85</u>
	Price <u>WITHOUT</u> Disposal Fee			
8.	Palm Maintenance (trimming; skinning/shaving; seed pod and volunteer removal; clean up; waste disposal; inspection and recommendations) Exception: _____	1	Each	\$ <u>33</u>
9.	Palm Trimming (includes seed pod) and Skinning/Shaving ONLY Exception: _____	1	Each	\$ <u>32</u>
10.	Palm Trimming (includes seed pod) ONLY Exception: _____	1	Each	\$ <u>30</u>
11.	Palm Skinning/Shaving ONLY Exception: _____	1	Foot	\$ <u>5</u>
12.	Volunteer Removal ONLY Exception: _____	1	Each	\$ <u>3</u>

Company Name: Somerset

PRICE SHEET

ITEM NO.	DESCRIPTION OF REQUIRED MATERIAL, SERVICE OR CONSTRUCTION	QTY	UNIT	UNIT PRICE
13.	Palm Inspection and recommendations ONLY Exception: _____	1	Each	\$ <u>35</u>
14.	Palm Pest, Chemical or Similar Treatment (City provides product) Exception: _____	1	Each	\$ <u>45</u>
15.	Palm Fertilization (City provides fertilizer) Exception: _____	1	Each	\$ <u>5</u>
16.	Palm Planting (Contractor provides Palm)			
	a. Open Location			
	Species: <u>Mex Fan</u> Height: <u>5' to 25'</u>	1	Each	\$ <u>415 - 2075</u> ([#] 83/ft)
	Species: <u>Calif. Fan</u> Height: <u>5' to 13'</u>	1	Each	\$ <u>565 - 1469</u> ([#] 113/ft)
	Species: <u>Date Palm</u> Height: <u>6' to 23'</u>	1	Each	\$ <u>4,500</u>
	b. Restricted Location			
	Species: <u>Mex Fan</u> Height: <u>5' to 25'</u>	1	Each	\$ <u>550 - 2750</u> ([#] 110/ft)
	Species: <u>Calif. Fan</u> Height: <u>5' to 13'</u>	1	Each	\$ <u>750 - 1950</u> ([#] 150/ft)
	Species: <u>Date Palm</u> Height: <u>6' to 23'</u>	1	Each	\$ <u>9,000</u>
16.	Palm Tree Removal			
	a. Open Location			
	Height: <u>1' to 20'</u> & Diameter: <u>no limit</u>	1	Each	\$ <u>276</u>
	Height: <u>21' to 40'</u> & Diameter: <u>" to "</u>	1	Each	\$ <u>552</u>
	Height: <u>41 to 70</u> & Diameter: <u>" to "</u>	1	Each	\$ <u>966</u>
	b. Restricted Location			
	Height: <u>1' to 20'</u> & Diameter: <u>no limit</u>	1	Each	\$ <u>330</u>
	Height: <u>21' to 40'</u> & Diameter: <u>" to "</u>	1	Each	\$ <u>660</u>
	Height: <u>40' to 70'</u> & Diameter: <u>" to "</u>	1	Each	\$ <u>1160</u>

Company Name: Somerset

PRICE SHEET

ITEM NO.	DESCRIPTION OF REQUIRED MATERIAL, SERVICE OR CONSTRUCTION	QTY	UNIT	UNIT PRICE
17.	Palm Stump Removal			
	a. Open Location			
	Diameter: <u>1" to 12"</u>	1	Each	\$ <u>35</u>
	Diameter: <u>13" to 24"</u>	1	Each	\$ <u>45</u>
	Diameter: <u>25" to up</u>	1	Each	\$ <u>55</u>
	b. Restricted Location			
	Diameter: <u>1" to 12"</u>	1	Each	\$ <u>55</u>
	Diameter: <u>13" to 24"</u>	1	Each	\$ <u>75</u>
	Diameter: <u>25" to up</u>	1	Each	\$ <u>85</u>

Somense!

Labor and Equipment Rates for Repair, Extra and Emergency Work

Labor Rates

Extra Work

Job Title	Rate Per Hour
2 person crew w/o Man lift	\$65/crew hr
2 person crew with man lift	\$155/ " "
1 person labor	\$30 ⁰⁰

Emergency Work

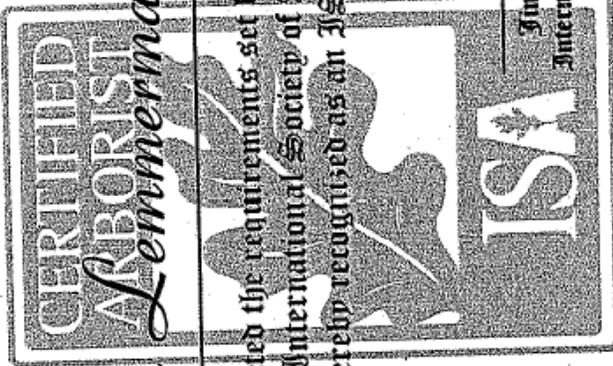
Job Title	Rate Per Hour
2 person crew w/o man lift	\$90/crew hr
2 person " with " "	\$325/ " "
1 person labor	\$45/hr

Equipment Rates

Equipment Type	Rate Per Day
chipper	\$200
Bucket truck - up to 75'	400
" " - " " 35'	300
Dump truck	100

International Society of Arboriculture Certified Arborist

Brian Lemmermann



Having successfully completed the requirements set by the Arborist Certification Board of the International Society of Arboriculture, the above named is hereby recognized as an ISA Certified Arborist



A handwritten signature in black ink, appearing to be 'J. Skiera'.

Jim Skiera, Executive Director
International Society of Arboriculture

WE-7918A Apr 28, 2007 Jun 30, 2010
Certification Number Certified Since Expiration Date

Addendum to Solicitation



City Procurement Office/City of Tempe • PO Box 5002 • 26 East 6th Street • Tempe, AZ 85280 • (480) 350-8324 • www.tempe.gov/purchasing

This addendum will modify and/or clarify: Solicitation No.: | 08-023
and is Addendum No. | 1
Procurement Description: | Palm Tree Trimming

Changes should be made as follows:

Change: Bid Due Date/Time from Wednesday, November 7, 2007, 3:00 P.M. Local Time to **Wednesday, November 14, 2007, 3:00 P.M. Local Time**

Change: Page 20, General Requirements – Contractor Employees and/or Sub-Contractor(s) – Number C to read as follows:

“All employees assigned to this contract *who perform any type of work on the palms* shall be ISA Certified Tree Workers or *Arborist* who are knowledgeable of the needs of this contract.”

The balance of the specifications and bid solicitation instructions to remain the same. Bidders/Proposal Offerors are to acknowledge receipt and acceptance of this addendum by returning of signed addendum with bid/proposal response. Failure to sign and return an addendum prior to bid/proposal opening time and date may make the bid/proposal response non-responsive to that portion of the solicitation as materially affected by the respective addendum.

Somerset Landscape Maintenance Inc. Brian Lemmeimann President
NAME OF COMPANY BY NAME (please print) TITLE
19051 S. Arizona Ave. 480-782-5296
ADDRESS (or PO Box) TELEPHONE
Chandler, AZ 85286
CITY STATE ZIP

AUTHORIZED SIGNATURE